

CardSmart Training

How to Cancel or Delete an Appointment from the Advising Center Mode

1. Select the **Advising Center** mode from the bottom right of your CardSmart home screen. Select your Advising Center location.



2. Locate the appointment on the calendar and click the blue appointment box to open it up.

10 AM		
	AA Career Planning	
11 AM		

Tips for Best Practice

Cancelling an advising appointment allows you the option to track the reason <u>WHY</u> the appointment was cancelled, and it keeps a record that can be used for reporting purposes later.

Deleting an appointment does not allow this option.

3. This opens the **Manage Appointment** dialog box and allows you to either cancel or delete the appointment. (You can also move or edit the appointment from this screen.)

manage appointment Academic Pl	anning		X	All Attendees	Cancel Appointment
				▲ Student Test	Cancel Appointment For:
AnAttenaces		ntment Detai	s [edit move]		Select A Reason
Travis Ross (Advisor) → Student Test →	When: Where: Course:	08:30 am - 09:00 am Where: Arts & Sciences Course: N/A	Comments: None Type: One Time Appointment		Comments:
	Reason:	Academic Planning			Don't Mark Mark as Cancelled

If you choose to **Cancel Appointment**, you will select responses in the drop-down boxes for the person who is cancelling the appointment and the reason it is being cancelled. You can include comments. If you select **Mark as Cancelled**, this entry will appear on your calendar. (Note that you can take other steps from this screen such as to delete the appointment or check the student in.)



If you choose to **Delete Appointment**, the appointment will no longer appear on reports or calendars. In choosing this option, you will not be able to track **why** the appointment was cancelled.

DELETE ACADEMIC PLANNING							
Are you sure you want to delete Academic Planning for the instance on 12/11/2014 10:00 AM-10:30 AM? It will no longer show up on reports or calendars.							
	cancel Delete Appointment Ins	tance					

4. Whether you **cancel** or **delete** the appointment, the student and advisor will get an email confirming the removal of the appointment.